

How to Use the PRF51 Training Services Statewide Contract

Contract #: PRF51 Contract Duration: 07/01/2012 to 12/31/2015*
MMARS #: PRF51* Options to renew: half a year through 6/30/16
COMMBUYS PO #: one per category – see Contract Summary
Max End Date: 6/30/16
Contract Manager: Peter Etzel 617-720-3397 Peter.Etzel@state.ma.us
This contract contains: Prompt Payment Discounts (PPD), Supplier Diversity Program (SDP), and Small Business Purchasing Program (SBPP)

*OSD plans to Bid a new Management Consulting contract PRF61 summer 2015 on [COMMBUYS](#). Contract PRF61 is to start 1/1/16 with a Professional Development category inclusive of PRF51 Categories 2, 3, and 4. PRF51 Category 1, Information Technology will no longer be on a Statewide Contract 1/1/16.

Contract Summary

This contract covers Training Services within the following categories:

Category 1- Information Technology

PO-14-1080-OSD01-OSD10-00000001333

Category 2 - Professional Development

PO-14-1080-OSD01-OSD10-00000001339

Category 3 - Instructional Design and Course Development

PO-14-1080-OSD01-OSD10-00000001340

Category 4 - Delivery of Content

PO-14-1080-OSD01-OSD10-00000001341

Training Services under this contract are available as follows: instructor-led, e-learning or blended learning or any other method agreed upon and negotiated by Eligible Entities and the Contractor. The Commonwealth primarily uses instructor-led training as Internet access is not always readily available in all Commonwealth locations. Under this contract Contractors are required to provide training by e-learning that is Sharable Content Object Reference Model (SCORM) compliant that includes the source file. [Note: SCORM is a collection of standards and specifications used for web-based e-learning. It defines communications between client side content and a host system called the run-time environment (commonly a function of a learning management system). SCORM also defines how content may be packaged into a transferable ZIP file.

Contractors have agreed that any training provided must ensure that all materials/handouts, spaces, and presentations are accessible to attendees with disabilities as required by Title II of the Americans with Disabilities Act. Additionally, all training provided by e-learning will be accessible by the ITD Accessibility Lab standards.

This Statewide Contract for Training Services is focused on providing training to public employees, public workers, and in some cases the general public in training areas that are not highly specialized. This

Statewide Contract does not cover trainings that are specific to: public safety, law enforcement, fire, healthcare, mental health, highway, environmental, legal, food preparation, scientific; or any other specialized training.

Benefits and Cost Savings

- At no additional cost to the Commonwealth, Contractors will provide all the equipment and materials including, but not limited to: binders, books, textbooks, articles, professional literature, and other handouts that are required to provide training services.
- Purchasers may take advantage of the Prompt Pay Discount Offer available by the Contractors as listed below in the "Vendor List".

Who Can Use This Contract?

Applicable Procurement Law: MGL c. 7, § 22; c. 30, § 51, § 52; 801 CMR 21.00

Eligible Entities:

01. Cities, towns, districts, counties and other political subdivisions
02. Executive, Legislative and Judicial Branches, including all Departments and elected offices therein;
03. Independent public authorities, commissions and quasi-public agencies
04. Local public libraries, public school districts and charter schools;
05. Public Hospitals, owned by the Commonwealth;
06. Public institutions of high education
07. Public purchasing cooperatives;
08. Non-profit, UFR-certified organizations that are doing business with the Commonwealth;
09. Other states and territories with no prior approval by the State Purchasing Agent required; and
10. Other entities when designated in writing by the State Purchasing Agent.

Pricing and Purchase Options (All Categories)

Purchase Options:

Services purchased through this contract will be direct outright purchases. A purchaser is required to obtain quotes from multiple (two or more) Statewide Training Contractors prior to issuing an order. Vendors are listed on each Category MBPO - click the "Vendor" Tab, then the "Distributors" Tab.

All orders placed under this contract must include the following statement: "This order is placed under Statewide Contract PRF51" Otherwise, the order will not be considered "use of a Statewide Contract" for procurement purposes. In addition it is recommended that the following language be included: "All of the terms and conditions of the Statewide Contract PRF51 are incorporated herein and made a part hereof. Conflicting or additional terms, conditions or agreements included in or attached to this form shall be considered to be superseded and void."

Under this Statewide Contract, commuting expenses will not be reimbursed. Standard Business Expenses may be allowed with prior authorization from a Commonwealth Agency but in no case will the amount be more than allowed for Commonwealth of Massachusetts employees. (Commonwealth Human Resources - search for the term "Red Book"),

Under this Statewide Contract, at no additional cost to the Commonwealth, Contractors will provide all the equipment and materials including, but not limited to: binders, books, textbooks, articles, professional literature, and other handouts that are required to provide training services. A buyer for may choose to allow use of its own equipment.

For e-learning, Contractors will provide alternative printed materials in sufficient quantity for all attendees who do not have access to equipment needed to take the training electronically. The cost is to be included in

the total quote in response to a purchaser's Statement of Work (SOW), which specifies the number of attendees requiring these alternative printed materials. The purchaser cannot hold the Contractor to the materials requirements of this section unless the number of people needing alternative materials is included in the SOW.

A requirement under this contract is that Contractors provide materials that reduce waste, such as, but not limited to:

- Providing information on flash drives as opposed to paper;
- Ensuring that when paper is used that it contains a minimum of 30% post-consumer recycled content; eliminates the use of binders or other binding or sealing materials that are difficult to recycle in traditional office recycling programs.

Pricing and buying details:

For purchaser job aids, click here: [COMMBUYS Purchasing Job Aids](#).

General Hint - One way to find this SWC is with "Advanced Search" entering the contract number (three letters two digits) in the "Description" field.

Ordering process when this contract requires quotes

Categories 1 and 2

Category 1 and 2 courses are offered on a regular basis and a Contractor's Course Offering Sheet price as posted as an attachment on COMMBUYS is considered a quoted price. A purchaser may negotiate with a Contractor for a lower price, particularly if a group will be training.

To solicit quotes in COMMBUYS for a Category 1 or 2 course: the general process you have to follow is: (1) obtain quotes by issuing an "open market" bid restricted to the vendors on this contract; (2) once the quotes have been obtained, and an award made cancel the bid; (3) issue a "release requisition" against the existing Master Blanket Purchase Order (MBPO) for this statewide contract; (4) once the requisition is approved, convert it to a PO and send to the vendor. The specific ordering steps to take are:

1. Create an Open Market Bid with "Purchase Type" "Open Market" and with "Bid Type" "Closed." On the Bidders tab, click the "Restricted" button and enter each bidders ID from the MBPO for this statewide contract. Under the "Items" tab, create a new item using the same Commodity / UNSPSC code as the relevant item on the MBPO for this statewide contract. Include specific product requirements for the order as an attachment and/or as part of the item description(s). Send the bid and obtain quotes.
2. Once the quotes have been received, award it, and then cancel the Open Market Bid. Do not create a Purchase Order from the Open Market Bid.
3. Create a Release Requisition referencing the MBPO for this statewide contract. When creating the requisition, look up the relevant SWC item by searching for the statewide contract number (three letters and two digits) in the "Description" field, click to "Select" the items, and then "Save & Exit." Once the item has been added to the requisition, edit it to add the specific product description and input the winning quote price. On the vendor tab, use the "Change Vendor" button to replace "Conversion Vendor" with the winning Quote Vendor. On the "Attachment" tab attach the winning Quote noting the Open Market Bid number in the "Description" field.
4. When approved take the Requisition through to your Purchase Order.

Categories 3 and 4

Category 3 Courses are developed to a purchaser's specifications by a Contractor. A statement by each vendor of their Category 3 capabilities is attached in COMMBUYS. Services in this category include the ability to conduct comprehensive needs assessments of the potential learners, learner analysis, writing specific behavioral learning objectives, instructional strategy deployment (action learning in particular), materials development including facilitator guides, facilitator notes and learner materials, and evaluation and learning transfer methodology. These services may also include the training of in-house trainers. The learning design and class content should be anchored in contemporary adult learning theory. - It is the

responsibility of the purchaser to select and establish the work parameters with a Category 3 Contractor on this Contract.

Category 4 contractors deliver course content, which may have been developed under Category 3, or developed by the purchaser. The learning content will be supplied by the purchaser to the Contractor for delivery to the learner (s). A statement by each vendor of their Category 4 capabilities is attached in COMMBUYS. - It is the responsibility of the purchaser to select and establish the work parameters with a Category 4 Contractor on this Contract.

Some Category 3 or Category 4 Contractors as part of their Category award information attached to the COMMBUYS PO for the Category listed an hourly rate or rates. A purchaser may negotiate with a Contractor for a lower rate. It is the responsibility of the purchaser to establish the work parameters through a statement of work (SOW) with Category 3 and Category 4 Contractors, which would typically include the number of hours required.

To solicit quotes in COMMBUYS for a Category 3 or 4 course: The Category 3 and Category 4 contracts have been set up as a distributor model (solicitation enabled) Master Blanket Purchase Order (MBPO) in COMMBUYS. A Solicitation Enabled Distributor Model MBPO is a single MBPO that has multiple vendors listed as distributors. This allows you to solicit quotes within COMMBUYS, then award the best value bidder and place the order through COMMBUYS. To see contractors are listed on the MBPO - click the "Vendor" Tab, then click the "Distributors" Tab. Specific steps to follow to create the bid for quoting through COMMBUYS:

1. Start with a New Requisition - on the General Tab, fill in all required information and make sure to check off the Solicitation Enabled check box.
2. Within the requisition, Click on the Items tab, click 'Search Items'; then click the plus sign next to Advanced Search to do an advanced search. Use PRF51 in the Description field; or enter the MBPO number in the Contract / PO# field.
3. Once item is added to the requisition, COMMBUYS will bring you to the Items tab and have an error message saying that the line item needs to have a value greater than 0. Click on **Enter Info** under the **Catalog Price/ Unit Cost** and enter in the **estimated cost**. This can be hidden from the bid before sending it to the vendors.
4. Click on the "Vendor" Tab, then click the "Distributors" Tab, then select all the vendors (you must solicit quotes from all current vendors).
5. Attach your RFQ and any other pertinent documents in the Attachment tab, making sure to check the box that says Show to Vendor.
6. The Reminders tab is for internal reminders visible to those with Basic Purchaser access to COMMBUYS.
7. Review the Summary Tab, and then Submit for Approval.
8. Once Approved, the Requisition will turn into a bid ready for purchasing, once it is in this status, you will need to click Convert to Bid.
9. Once it is converted to a Bid, go through all the tabs and enter in the required information. On the Items tab you can delete the cost that was previously entered on the requisition so no estimated cost shows to the vendor, or if you leave the previously entered cost this will show to the vendor as an estimated cost.
10. Once all information is reviewed submit the Bid for approval. Once approved, send it to all the vendors.
11. After quotes are received and evaluations of them are completed, awards and orders should be placed through COMMBUYS from the Bid.

Additional Information

Geographic service and delivery areas - Contractors will be able to provide the requested service(s) throughout the Commonwealth. In many cases the training will be provided at a purchaser's location. Delivery of training may also be provided at a Contractor's location.

Where to Find Contract Information on COMMBUYS

To find in depth Master Blanket Purchase Order (MBPO) information: on the [COMMBUYS](#) login page click on the “Contract & Bid Search” link, click the Contracts/Blankets button, enter contract number (three letters two digits) in the Contract/Blanket Description, (if you have logged in and searching, some users will see a box labelled “Header Major Status” – if so, use the dropdown menu to select “3PS-Sent”), then all users click the “Find It” button, to see all MBPO’s. You will see the MBPO’s listed above for the four categories. If you see a “vCurrent” MBPO, it is historical information from the prior COMM-PASS system. Click the link you want to see. The Contract User Guide and RFR are posted with the MBPO’s.

Strategic Sourcing Team Members

| Name | Organization | Email Address |
|-----------------------|---|--|
| Charles Caron | Department of Public Health | Charles.Caron@State.MA.US |
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Vendor List and Contract information

The available Contractors are listed below. Supplier involvement in the following programs will have the appropriate three to four letter code at the end of the vendor listing. Programs include Small Business Purchasing Program (SBPP), Supply Diversity Office Certification (SDO, Formerly SOMWBA Certification), Supplier Diversity Program (SDP, Formerly AMP), Environmentally Preferable Products Program (EPP), & Prompt Pay Discount (PPD):

Contractors PRF51 Training Services

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| 7 Generations Inc. Account Manager: Loretta Sanford Phone Number: 877-777-6756 E-mail: services@7generationsinc.com Awarded Categories: II, III, IV Programs: SBPP, SDO, SDP, PPD: 1.5%/10, 1%/15, .75%/20, .50%/30 | Morgan, Brown & Joy LLP Account Manager: Jaclyn Kugell Phone Number: 617-523-6666 E-mail: jkugell@morganbrown.com Awarded Categories: II Programs: SDP, PPD: .50%/10, 1%/15, 1.5%/20, 2%/30 |
| Michael Gillen DBA Casey Hall Training Associates Account Manager: Michael Gillen Phone Number: 617-821-1612 E-mail: mwgillen@comcast.net Awarded Categories: II, III, IV Programs: SDP, PPD: 1%/10 | NHCLC-Boston Inc. DBA New Horizons Computer Learning Centers Account Manager: Stephanie Crocker Phone Number: 781-487-3228 E-mail: scrocker@nhboston.com Awarded Categories: I, II Programs: SBPP, SDP, PPD: 1%/30 |
| CompuWorks Systems, Inc. Account Manager: Andrew Wight Phone Number: 781-224-1113 x1414 E-mail: awight@compuworks.com Awarded Categories: I, II, III, IV Programs: SBPP, SDO, SDP, PPD: 1%/10, 15, 20 | Peeler Associates Account Manager: Marie Peeler Phone Number: 781-294-9203 E-mail: mpeeler@peelerassociates.com Awarded Categories: II, III Programs: SBPP, SDO, SDP, PPD: 3%/10, 2%15, 20, 1%/30 |
| Crisis Management Group, Inc. CMG Assoc. Account Manager: Bruce Cedar Phone Number: 617-969-7600 E-mail: bcedar@cmgassociates.com Awarded Categories: I, II, III, IV Programs: SDP, PPD: 3%/10, 2%/15, 1%/20, 30 | Self Esteem Boston Account Manager: Jeri Levitt Phone Number: 617-983-1111 E-mail: empowermail@selfesteemboston.com Awarded Categories: II Programs: SBPP, SDO, SDP, PPD: 1%/10, 15, 20 |
| CyberSense Training & Consulting, Inc. Account Manager: Kathlene Arnold Phone Number: 617-818-8890 E-mail: karnold@cybersensetraining.com Awarded Categories: I, III, IV Programs: SDP, PPD: 2%/10, 1.5%/15, 1%/20, .50%/30 | SkillSoft Corporation Account Manager: Heather Bouvier Phone Number: 617-315-7570 E-mail: heather_bouvier@skillsoft.com Awarded Categories: I, II, III, IV Programs: SDP, PPD: 2%/10 |
| Dynamics Research Corporation Account Manager: George Gotsis Phone Number: 978-289-1666 E-mail: askbd@drc.com Awarded Categories: III, IV Programs: SDP, PPD: 1%/10, 15, 20, 30 | Skyline Advanced Technology Services Account Manager: Kelly Fitzgibbons Phone Number: 773 444 4212 E-mail: KFitzgibbons@skyline-ats.com Awarded Categories: I, III, IV Programs: SDP, PPD: 1%/10 |
| Farrah Consulting Group, Inc. Account Manager: Maria Farrah Howell Phone Number: 617-947-3797 E-mail: mfarrah@farrahconsulting.com Awarded Categories: II Programs: SBPP, SDP, PPD: 8%/10, 6%/15, 4%/20, 2%/30 | Univ. of Massachusetts Donahue Institute Account Manager: Laura Eve-Cowles Phone Number: 413-545-0001 E-mail: leve-cowles@donahue.umassp.edu Awarded Categories: I, II, III, IV Programs: SDP, PPD: 4%/10, 3%/15, 2%/20 |

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| <p>Learning Tree International Account Manager: Marthe Lewis Phone Number: 703-709-9119 E-mail: contracts@learningtree.com Awarded Categories: I, II, III, IV Programs: SDP, PPD: NONE AVAILABLE</p> | <p>Weisman Consulting Account Manager: Paul Weisman Phone Number: 617-413-4291 E-mail: paul@weismanconsulting.com Awarded Categories: II, III, IV Programs: SDP, PPD: 2%/10, 1.5%/15, 1%/20</p> |
| | <p>WorkTerrain DBA KidsTerrain, Inc. Account Manager: Rena Hannaford Phone Number: 978-658-2131 E-mail: rhannaford@workterrain.com Awarded Categories: I, II Programs: SBPP, SDO, SDP, PPD: 5%/10, 4%/15, 3%/20, 2%/30</p> |